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ABSTRACT

One hundred widows were interviewed to determine their patterns of coping with problems they encounter in widowhood. Utilizing McClusky's theory of margin, the self-identified problems encountered in widowhood were viewed as "load" factors, while the services and resources the widow used were considered "power" factors. A widow's margin (load/power ratio) was represented by her ability to utilize the power factors to alleviate her problems. The problems (load factors) identified by the widows are as follow: nineteen identified "can't do what I used to due to a lack of money," seventeen identified "trouble making ends meet," seven identified "trouble finding a job," and sixteen identified "too much time on my hands." The findings suggest that the only load factors where widows do not rely on their informal (e.g., self, family, friends) support systems are medical problems, legal problems, and problems resulting from financial difficulties. Family members and friends appear to be very important power factors which are used to cope with a wide range of load factors. Only one widow identified vocational training/counseling as a service that was utilized. Voluntary associations were utilized more than formal services. Thus, adult educators might want to work with social workers to initiate more formal programs (e.g., mutual help groups, how to get re-involved with the job market, budgeting classes, social skills training, etc.). More research is needed, though, to determine whether widows do not choose to participate because of the formalized nature of available services or if current formal services are just not meeting their needs. (EM)

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AN EXPLORATION OF WIDOWHOOD: IMPLICATIONS FOR ADULT EDUCATORS

by

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INTRODUCTION

To date, the area of widowhood has been investigated from two overlapping perspectives. The first perspective has two main foci: (a) identification of problems widows encounter; and (b) the effect(s) certain background and attitudinal variables have on the identified problems. The resultant literature utilizes a problem-solving perspective in suggesting services and resources that might alleviate the identified problems. Another set of studies describes current services offered to widows thus representing the second perspective. Unfortunately this literature is relatively small (Abrahams, 1971; Barrett, 1973, 1976; and Silverman, 1974) reflecting the absence of programs designed specifically for a widowed population. What is lacking is a study utilizing a holistic approach which examines widowhood, exploring the problems widows encounter, the services and resources they utilize in efforts to cope with their problems and how their coping abilities vary according to their background and attitudinal characteristics. This gap results in an incomplete picture of widowhood, and thus the area of widowhood has been characterized as a relatively neglected area of study by social scientists.

This has occurred despite the fact that the

population of widows has been steadily increasing in number in the population of older Americans (Berardo, 1967). The Metropolitan Life Insurance Company (1962) reported that during the previous two decades, the number of widows grew by more than 100,000 a year. The 1970 census data (U. S. Census of Population) reveals that there are twelve million widowed persons in this country. This represents a sizeable minority (5% of our total population). Of this twelve million, ten million are widowed women. The average duration of widowhood for widows who do not remarry and who die from natural causes is eighteen and one-half years (Carter and Glick, 1970). If present projections for increased longevity prove true, it is entirely possible that the length of this period may increase.

Why has the area of widowhood been relatively neglected by social scientists? A combination of three factors may be responsible for the current gap in research. The first factor to be considered is the societal "death taboo" (Berardo, 1968; Kubler-Ross, 1969; Lopata, 1971a, 1971b, 1972, 1973d, 1975). The area of death and dying, as an event and as a process had been neglected until Kubler-Ross (1969) began to explore the process of dying and various means to alleviate the psychological pain of the identified patient and his/her family. Widowhood is triggered by the death of a spouse, thus one cannot examine widowhood without examining the areas of death and bereavement. The

societal death taboo has apparently prevailed, resulting in the problems of a large minority group being inadequately understood.

The second factor being proposed to account for the neglect of widowhood is what gerontologists have labelled our "youth oriented culture" (Puner, 1974; Butler, 1975) in this country. The majority of the widowed population is over sixty-five and thus an age factor or "ageism" may contrubite to the lack of interest in this population. In addition, societal norms encourage remarriage as a solution to the problems of widows while ignoring the fact that older widows out-number older widowers by a ratio of four to one. The chances for an older widow to remarry (if she so desires) are reduced by the fact that there are not enough older single men. In addition, widowers usually marry women somewhat younger than themselves (Bengtson, 1977; and Cleveland, 1976).

The third factor resulting in a lack of research on this population of older adults has been outlined by researchers who have suggested that as an outgrowth of a male dominated society (Barrett, 1973; Lopata, 1971b, 1973d, 1975; and Silverman, 1974) women have been socialized into dependent roles. This has resulted in what some have labelled a "couples oriented world." A couples orientation has even been acknowledged in our "pop" psychology books, e.g., O'Neil and O'Neil (1972) label this trend the

"couple front." A couples' orientation results in the exclusion of single adults, often viewing them as a threat to a secure marriage (Barrett, 1973, 1976; Barrett and Snyder, 1976; Caine, 1975; Lopata, 1971a, 1971b, 1972, 1973c, 1973d, 1975; and Silverman, 1967).

In summary, it is being proposed that the current gap or relative neglect of widowhood as an area of study has been a result of three factors operating in this society: (a) the death taboo; (b) the youth orientation; and (c) the couples orientation. These three factors have resulted in the widowed population being classified as an "invisible minority," (Lopata, 1971b). An awareness of the fact that three-quarters of American women will experience at least seven to ten years of widowhood makes it imperative that the problems of this "invisible minority" be researched and understood.

The literature (Barrett, 1973, 1976; Berardo, 1968; Lopata, 1973d; and Silverman, 1967, 1970, 1974) suggests that widowhood can be viewed as a crisis. Thus, widowhood as a crisis can, with time, be a positive growth producing experience (Lopata, 1973c, 1973d, 1975) or it can be a negative experience resulting in a great deal of psychological pain and even mental illness (Barrett, 1973, 1976; Berardo, 1968; Lopata, 1971a, 1971b, 1973c, 1973d, 1975; Silverman, 1967, 1970, 1974; and Woodruff, 1975). This was expressed

by Gerald Caplan in Silverman (1974):

> The death of a spouse is for most people a traumatic event that produces drastic changes in almost every aspect of life. In addition to the immediate pain, it leads to prolonged psychological and social burdens. Our Harvard researchers have shown that this crisis and its aftermath increase the risk of mental and physical disorder in the survivors. We have also discovered that, as in other crises the painful process of adjustment also provides an opportunity for many widows and widowers to gain in maturity, to develop psychologically, to be tempered by the fire.

Widowhood represents a challenge to professionals in the fields of social welfare and mental health who are concerned with maintaining or improving the level of psychological and social functioning in the community.

This research represents an initial effort to contribute factual as well as theoretical data to professionals and practitioners working with widowed populations. The holistic approach contained herein results in a comprehensive picture of widowhood thereby decreasing our present gaps of knowledge regarding the widowed population in this country.

METHOD

Sample

A systematic randomized sample was taken from the Madison City Directory. A sample pool of 410 names was used in generating the desired sample size of 100. All sampled respondents were widows living in Madison, Wisconsin.

The mean age for the total sample is 67.4 years. Eight percent of the respondents are young widows (less than 55); 28% are middle aged (55-64), while 64% are 65 or older. The majority (67%) of respondents are not currently working, although when they did work, 65% held white collar jobs. This figure may be partially explained by the exceptionally high level of education (74% received at least a high school education.) The respondent yielded a mean number of children still alive of 2.37. Perhaps this figure reflects the religions and ethnic preferences as well as the occupational and educational levels of the respondents which are; Protestantism (60%), and Catholicism (34%). The subjects identify predominantly with German (35%) or English Scotch (26%) ethnic groups. Noteworthy are the respondents' high education, occupation and income levels, particularly in comparison to other previously sampled widowed populations.

Theory

The Theory of Margin (McClusky 1970, 1971) was chosen as the theory to be used in this study.

Figure 1

THE THEORY OF MARGIN

External Load - tasks involved in the usual requirements of living (family, work, civic obligations, etc.)

LOAD

Internal Load - those life experiences set up by the self.

MARGIN----------

POWER (to carry the load) a combination of such factors as physical, social, mental, and economic abilities, as well as other skills which may contribute to the effective performance of life tasks.

According to this formula, a person's performance will in part be a function of the dimensions and value of load, as well as the capacity of the person to carry the load. If this ratio is close to 1.00 and for a long time remains there, the adult may be close to a point of breakdown; if, however, it remains within a range from .50 to .80, he/she would have a margin to meet the emergencies of life.

The theory of margin was designed for studying the later years of life which McClusky (1970) characterized as "a period in which significant and drastic changes in the load-power relationship are taking place." A review of the literature presented widowhood as a period involving significant and often drastic changes in a woman's life; thus the theory of margin seemed particularly appropriate for the study population.

The self-identified problems a woman encounters in widowhood were viewed as "load" factors. The self-identified services and resources a widow utilizes (formal and informal) were viewed as "power" factors. A widow's "margin" was represented by her ability to effectively utilize the power factors at her disposal so that her problems were alleviated. According to the theory of margin, a woman will be able to cope with her status of widow if she has a surplus of power, or if she is able to reduce her load. In either case, her margins would then be sufficient to perform her life tasks.

FIGURE 2

THE THEORY OF MARGIN AS IT RELATES TO WIDOWHOOD

LOAD: PROBLEMS

----------MARGIN: ABILITY TO USE POWER FACTORS AS MEASURED BY USEFULNESS OF POWER IN ALLEVIATING THE SPECIFIC PROBLEMS.

POWER: SERVICES AND RESOURCES

Interview Schedule and Interviewers:

The interview schedule was a closed ended questionnaire which took about an hour and a half to complete. Interviewees were handed cards throughout the interview which provided them with a list of problems, services, residence, and income options, so that they did not have to keep track of many items at once, and could refer to the card in front of them. Five interviewers were hired and trained by the researcher. All five were older widows (ages ranged from 66-76). They were able to identify with and relate to a lot of the problems interviewers mentioned.*

*An unexpected outcome of this study was that all interviewers said repeatedly that they felt "so much better about themselves" after seeing other women struggle with some of the same issues. As one said, "You know I'm not doing so badly after all."

Interview Schedule and Interviewers:

Coping Patterns: For the purposes of this research, coping patterns are conceptualized as the widows' actions involved in utilizing specific formal and informal resources in order to cope with each problem they encounter in widowhood. Developing the coping patterns involved a specification of load factors identified by the sampled widows as well as a specification of the power facotrs employed in carrying the load. Development of these patterns involved matching the identified problem (load) with the specific formal and informal services (power) widows employed in coping with that problem. Thus a widow's coping patterns represent her utilization of options available to her. Principle components analysis as well as hand analysis was used to generate the coping patterns.

RESULTS

1. Too much time on my hands (n = 16)*

Principle components analysis yielded five coping patterns used with this problem or load factor: 1) other,**

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*Sixteen sampled widows identified "too much time on my hands" as a problem they had encountered in widowhood.

**In this case "other" refers to reading, television, cards, and listening to the radio.

other, and myself; 2) job and siblings; 3) voluntary associations and myself; 4) friends, myself and siblings; 5) children and myself.

One power factor, myself, is used consistently with this load factor. In addition to use of self, sampled widows affected by this problem used a mixture of formal and informal service options (power factors). This mixture of service options is apparent in most coping patterns and is most consistent for internal problems or internal load factors.

According to the theory of margin the most important power factor for this particular load factor is myself. It is interesting that despite its apparent importance, use of self is found in conjunction with at least one other power factor. This might suggest that the sampled widows tried adjusting on their own and then solicited outside help, or perhaps others saw the widows trying to cope and volunteered their services.

2. Trouble making ends meet (n = 17)

Three coping patterns were produced for this load factor as follows: 1) lawyer, social security administration, myself and a job; 2) other* and myself; and 3) children and a job.

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*In this case "other" refers to selling property or moving.

These patterns represent a mixture of formal and informal service usage with an emphasis on formal power factors as well as self and others usage. Comments given during the interviews in regard to this problem and the problem "can't do what I used to due to a lack of money" reflect the widows' necessary acceptance of their reduced incomes: "I learned to adjust;" "I had to adjust," "I learned to get by on less," "I don't do it." This personal adjustment may be a type of resignation taken after appeals to formal services such as a lawyer, or working were exhausted or unsuccessful.

In addition, older widows reported having difficulty obtaining employment due to their age and the fact that their skills were often out-dated. Thus, older widows often had no choice but to resign themselves and adjust to reduced incomes. This situation suggests a need for adult continuing education e.g. classes in budgeting, to up-date skills, and perhaps classes which would focus on how one finds and/or interviews for jobs. It does appear that older widows will be at a disadvantage and will be more likely to experience this problem. Older widows cited myself as adjusting whereas younger widows citing themselves often did so in the context of using themselves in finding a job.

3. Can't do what I used to due to a lack of money (n = 19)

The following three patterns were produced by hand: 1) myself, 2) work, myself, and social security; 3) social security. Three widows offered "denial" as the power factor used, one said "I don't do it," and another said "I adjusted."

Perhaps patterns one and three were used by older widows who did not have the option of working due to age discrimination, obsolete skills, or health problems, whereas the second pattern was probably used by younger widows who were either employed at the time of their husband's death or who had obtained a job after his death.

4. Trouble finding a job (n = 7)

Due to the small number of widows identifying this as a problem, the following patterns were developed by hand: 1) myself; and 2) myself and other.* This pattern provides continued evidence of the widows' reliance in self.

DISCUSSION

It should be noted that the sampled widows were presented with a list of 25 problems and were encouraged to identify as many problems as they had encountered. Coping patterns were produced for twenty-one problems, thus the results reported herein represent a small segment of the

*In this case other refers to newspaper, vocational training/counseling; sold house and moved.

research findings. The results of the entire study suggest that the only load factors where widows do not rely on their informal support systems are medical problems, legal problems, and problems resulting from financial difficulties. In this last case, widows coped by simply cutting back and denying themselves. It appears that unlike Lopata's findings (1973 a, b, c, d) widows in Madison are able to call upon close family members for help with a wide range of problems. Perhaps the most consistent finding of the entire study is that family members and friends appear to be very important power factors used to cope with a wide range of internal and external load factors.*

This study represents an initial effort to test and apply the theory of margin, which was developed within the framework of adult education to a social welfare problem area. As such the researcher has tried to identify an interface shared by adult educators and social workers. It would seem that adult educators and social workers could work together effectively to enhance a widows informal network and perhaps to initiate new efforts that would meet

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*The reason this information is offered at this point is to present the reader with a more holistic view of the findings. Space did not allow for a complete accounting, but since the results reported herein are at variance with major trends in the entire research project this was done to assure that results presented here would be seen in their proper perspective.

their needs. These results reported here do suggest a need for services and resources that would help widows cope with their financial problems. Other problem areas identified, e.g., grief, isolation, feeling lost and hopeless, suggest the need for more informal programs designed to facilitate a widow's re-engagement with society.

It is being suggested here that adult educators have a body of techniques, tools, theories, etc. re: adult learning. If these could be used in conjunction with social work techniques of communication, we might be able to meet the needs of this adult population to a much larger extent than is currently being done. Both disciplines have their own, yet overlapping, ways of conducting needs assessment, planning, and evaluation stages of their contacts with adults. It would appear that both disciplines could profit by sharing what they have learned re: effectiveness of their concepts and actions for dealing with adults. The theory of margin has provided this researcher with a valuable tool. It allowed the researcher to interpret findings within a new framework, and thus, led to new conclusions about widows and their coping mechanisms. When viewed within a framework provided by the theory of margin, the sampled widows appear to be coping fairly well. This is evidenced by fairly high usefulness ratings or margin scores (mean =3.9). These margin scores reflect a trend; as the sampled widows encountered increased number of

problems, they were able to utilize increased number of services in order to alleviate their problems.*

This last point (of coping well) should not be taken as advocating the idea that widows do not have special problems or that widows should continue to receive little attention. This is just not the case. Widows do experience myriad problems but it appears that after a certain amount of time, they have resigned themselves to their changed status and they try to adjust their standard of living accordingly.

The sampled widows reported during their interviews that they were not pleased with these adjustments, but they had concluded for themselves that if they did not change their life styles considerably, their situation would worsen. It appears from demographic data (Abrahams 1972; Barrett 1973, 1976; Berardo 1968; and Carter and Glick, 1970) that widowhood can be thought of as the final stage of marriage and life for most women since 75% of American women will be widowed. Assuming this is the case, it seems

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*It has been reported (Atchley 1975; Barrett 1975, 1976; Barrett and Snyder 1975; Loputa 1970, 1971a, 1971b, 1973d, 1976; Morgan 1975; and Silverman 1967, 1970) that widows with high education, occupation, and income levels do cope with their problems better than widows with less education and lower incomes. This may be occuring in Madison, Wisconsin where widows had attained higher income, occupation, and education leads than reported in previous studies.

that more resources should be provided to widows so they would not have to restrain their life styles to the point that is presently necessary for mere survival. It seems, at least to this researcher, that widows deserve a better quality of life, in this final stage of life and marriage than they are currently experiencing.

SUMMARY

Nineteen widows identified "can't do what I used to due to a lack of money," 17 widows identified "trouble making ends meet," 7 widows identified "trouble finding a job," and 16 widows identified "too much time on my hands" as load factors (problems) they encountered in widowhood. Yet only one widow identified "vocational training/ counseling" as a service that was utilized. This suggests that adult educators within the area of vocational training and continuing education are not reaching a large population that could use their services.

If we are to facilitate widows coping with their new status as single women in a couples oriented society the best place appears to be within the community in informal settings. Voluntary associations were utilized more than formal options. Thus adult educators might want to work with social workers to initiate more formal programs (e.g. mutual help groups, how to get re-involved in the job

market, budgeting classes, or social skills training) utilizing word-of-mouth and mass media techniques for advertising their existance.

In addition, this research suggests that one's informal support network is most important to a widow's coping patterns. Further research which would focus on programs designed to enhance informal networks effectiveness should be initiated and studied. Also needed is research that would explore why widows are not currently using more formal services that are available. We do not yet know if widows simply don't know they exist, or if they do not choose to participate because of the formalized nature itself or if the current formal services are just not meeting their needs.

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